**Meeting at Texas A&M on July 9th**.

 Kelly, Jason, Rick, William, Robert, Alexis and George Menz in the morning and Dean Moriss , Rebecca and Arnie in the afternoon.

**Morning Session- Kelly, Rick, Jason, Robert, William, Alexis and George Menz**

We reviewed the calendar and discussed new topics or sections for Tax Facts:

* Tax issues with ante and post nuptial planning
* Trusts as it affects the under $5.43 M estate. Spendthrifts and to some extent GRATS and health care trusts, special needs
* Investment/Regulated Investment Company’s
* More questions on REITS
* International Tax- Beyond tax, just doing business in Canada

I will work with Alexis to narrow this down in that this may be too many topics we can get done

Then discussed the new online product/redesign

* Primary sources-just include full text docs to embedded cites
* Because regulations can be so long, we may want to embed to sthe sub-section level. I will look at RIA and see how that is done.
* NUAM- The biggest issue is having the right level of relationship between documents in TF vs. NUAM. A three level tiering of documents was suggested as a way to pair the documents. The next step here is for Alexis and I to get together and create an approach.
* Also suggested focusing on the TF documents that get used the most online as a way to focus the work on NUAM

I asked for more contributions from authors to support the new current awareness product, particularly at Texas A & M. Unclear as to the help I will get on this

I noted that the Advisor Journal’s articles are exceptional and would love to get more like this. William agreed to add a fifth article each month which would be more like his take on something developing. More of a personal, opinion piece.

**Afternoon Session- Everyone from morning plus Becky, Arnie and Moriss**

Texas A&M is putting together a JD program for law students interested in the field of legal publishing.

William asked how we use interns/law students and what the need might be. We don’t have a formal program the way William discuss it and I don’t think we have need of it.

Possibility for ALM for those students interested in journalism/law?

The Dean reviewed the criteria for the rankings used by US World and News Report and re-stated the desire to be a tier one law school.

Direct mail, advertising and other kinds of media were discussed here as a way to raise Texas A & M visibility along with forming community of Aggie lawyers , custom Imprints of books

We also raised the specific idea of Texas A & M having some very active role in ALM’s Women in Law conference.

Beyond that. The real to do from this meeting was that Matt Weiner would assemble a team of people at ALM to see how ALM could help Texas A & M raise

visibility. Matt would be the contact for that effort. Not sure who follows up with whom on this.

Some subject matter expertise that Dean Morris thought the school was strong on were as follows:

Intellectual Property- Strong in paternt, copyright, trademarks and unfair trade

Commercial Code reform as well as sales and commercial transactions

Alternative Energy and specifically water policy

Agriculture and Food Safety

Ethics

LLM in a tax/wealth management degree was discussed. Won’t happen for another year.

Dean Moriss shared on his experience at Alabama. The students have a high need to meet and network amoung themselves. They sponsored a trip to the Cayman Islands where that couold happen as well as instruction for credit on offshore transactions.

Alabama found that rolling 7 week sessions worked best although it took two years for the students.

I don’t know if there were specific to dos relating to the LLM program in taxation.

The sense of urgency was around the establishment of a wealth management program whether joint JD program in law and wealth management or some other approach would work best.

We reviewed our version of a joint program on wealth management and they liked what we were proposing. A couple of thoughts came out of that presentation:

1. Should we call it wealth management or financial planning?
2. The programs we presented had an emphasis on client communication. Dean Moriss thought there were other communication classes they had done on DISC, for example
3. How much should the topic of risk management be a part of a wealth management program

I think the to do here is that William Byrnes is going to call me in the next few days as he has a 60 day window on the topic of wealth management

Then Texas A & M expressed interest in additional certifications :

One was certification to be a vendor to the federal government which includes a course in diversity. Jack Manheir is the guy who might do something like this.

Another was forensic financial investigation that could be taught by Burke Files. He wrote an undersold book called “Financial Due Diligence for the Financial Professional” The idea would be to make a nine credit certification

There is a need for continuing education in insurance and wealth management , particularly in the Carribean based on the Dean’s experience.

Then William brought up the idea of distribution to companies such as Becker owned by Devry and Bar-bri.

I don’t know if there was a to do out of this or not